Improving Customer Service and Work Flow

A PROGRAM TO TRAIN LIBRARY TECHNICIANS IN THE BASICS OF REFERENCE SERVICES ENABLED A FEDERAL RESEARCH LIBRARY TO MAKE MORE EFFICIENT USE OF PROFESSIONAL STAFF AND PROVIDE BETTER SERVICE TO USERS.

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Many service organizations, such as IT help-desks and retail customer support hotlines, employ an escalating level of customer service and support personnel to optimize limited staffing. Commonly asked or general information questions are handled by front-line staff, while more complex questions are passed on to specialists. This model of staffing contributes to efficient utilization of professional staff as well as improved work flows.

With this concept in mind, the research library of the National Institute of Standards and Technology (NIST) initiated the First Point of Contact Program in 1997. The program was intended to provide training for library technicians (library paraprofessionals) in the basics of reference work in a special library environment, thereby allowing librarians more time to focus on in-depth research projects and customer outreach.

In 2007, the NIST Research Library reinstituted the training program for its library technicians using new tools and instruction plans based on lessons learned from the 1997 program. As part of this process, the content from the 1997 program was reviewed and updated to reflect the significant changes that had occurred in the way reference information is packaged, accessed and delivered. Web-based content and delivery tools have considerably changed how reference questions are handled, so many of the instructional materials needed to be completely reworked.

As for the instructional methodology, we were fortunate to have members on staff who had participated in the 1997 program. While consulting with them in the initial stages of the redesign, we learned that one of the challenges faced by program participants in 1997 was retaining the skills and knowledge needed to answer reference questions after the training ended. With this in mind, we decided to make the learning process as practical as possible, with many opportunities for hands-on experience.

After seeing firsthand the variety and complexity of inquiries handled by the library, the technicians reported having a new appreciation for the skills of the professional library staff.

First Point of Contact instructors MaryAnn Hogan (standing, far left) and Keith Martin (standing, far right) are pictured with the library technicians who took part in the training (clockwise from top left: Alan Olson, Myriam Dilawari, Bonnie Gray, Julie Jew and Marilyn White).

The Training Process

NIST is a non-regulatory federal agency within the U.S. Department of Commerce. Its mission is to promote U.S. innovation and industrial competitiveness by advancing measurement science, standards and technology in ways that enhance economic security and improve the quality of life. The NIST Research Library provides research support to a staff of 3,000 in both the core competencies of the NIST Laboratories (such as traditional physics, chemistry and engineering) and in new research areas supporting national goals.

First Point of Contact was developed to provide training for research library technicians in the basics of reference work specific to a science library environment, with the intent that the library technicians will literally be the "first point of contact" for library customers. The purpose of this program is to (1) make knowledgeable and trained staff available to augment the professional public services team and allow librarians

more time to focus on in-depth research projects and customer outreach, and (2) provide a professional development opportunity for library technicians.

To incorporate new technologies into the program, all training materials, including the program syllabus, homework assignments and helpful tips, were posted on an internal library wiki (see Figure 1). The wiki pages were originally created by librarian instructors, but training participants were encouraged to update and edit the pages to make the wiki as useful as possible for themselves and for future program participants.

We began the program by asking for volunteer participants at a monthly research library staff meeting. We provided a brief description of the program and explained what would be expected of the volunteers. We required program participants to be part of the regularly scheduled reference desk rotation instead of simply staffing the reference desk on an as-needed basis. Five technicians volunteered to participate: two from circulation

and three from technical services.

Training requirements were posted on our wiki. Each participant was required to complete one month of hands-on training and attend all classroom sessions. Upon completion of the training, each technician could then decide whether to continue as part of the regularly scheduled reference team.

While all the volunteers in the program had some experience working in a library, none had experience providing reference services. We developed our training materials to give less-experienced participants a logical path to follow when attempting to answer customer inquiries. The training we provided consisted of three parts: classroom instruction, hands-on training, and reference desk "shadowing."

Classroom training. Three one-hour classroom sessions were followed by hands-on training at the reference desk to mutually reinforce the information and skills being taught. The focus of the first classroom session was the ref-

erence interview. Drawing on our own experiences as professional librarians, we explained that the majority of library users who visit the NIST reference desk are seeking assistance with one of the four following tasks: clarifying or correcting a literature citation, locating a list of publications on a given topic, finding published data about a chemical or material property, or learning about prominent individuals or events in NIST history. We emphasized that the goal of the reference interview is to help determine the category into which each inquiry fits.

After explaining some of the techniques used in a reference interview, we utilized role playing to give the participants opportunities to practice. The librarian instructors acted as patrons, asking questions of the class participants. Role playing continued until each participant felt comfortable with the four question categories and could identify the correct category of each question asked of them.

The second classroom session focused on the library's online resources, the basics of Boolean searching, and the library's databases. The corresponding hands-on portion included a set of questions designed to familiarize trainees with the content of each database (see Figure 2).

The final training session covered information sources outside the library but within NIST, such as institute-produced standard reference databases and other unique data sources.

Hands-on training. During the first hands-on portion of training, we introduced technicians to the most commonly used reference sources in the library for answering questions in each of the four categories of inquiries outlined in the classroom training. To encourage use of these sources, technicians were asked to answer questions taken from actual inquiries that had been received at the reference desk (see Figure 3).

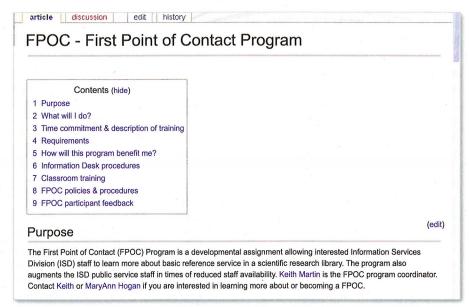The month-long training required each participant to work a two-hour shift with a librarian at the reference

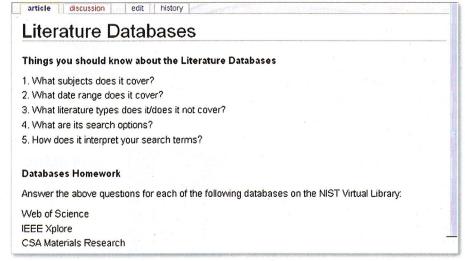**Figure 1: The First Point of Contact Training Program Wiki**
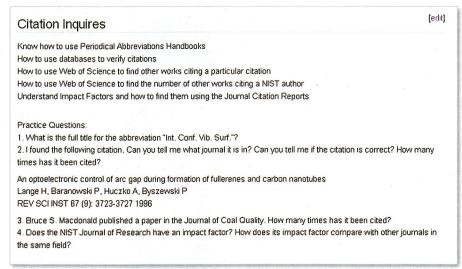

Figure 2: Database Reference Assignment

Figure 3: Sample Reference Assignment

desk each day. While one month of formal training may not be adequate to cover all the possible questions and scenarios, we purposely limited training to 30 days for multiple reasons.

First, our intent was not to train our technicians to be reference librarians but to ensure they were knowledgeable enough to handle common inquiries. Condensing the training to focus on basic skills and sources gave participants a narrower but more easily mastered set of skills than a lengthy and broader training would have allowed. Second, since trainees in the 1997 program had forgotten much of what they learned soon after completing formal training, we wanted participants in the revised program to have immediate hands-on opportunities to practice the skills they had learned. Lastly, we planned to continue mentoring the technicians so they could learn new skills to handle a wider variety of inquiries.

Shadowed reference desk training. For the shadowed reference desk portion of the training, we spent the first week introducing trainees to our reference desk procedures, service level expectations, and common reference sources. During the second week, program participants shadowed us as we assisted patrons; the next week, the trainees assisted patrons directly while a librarian observed, offering assistance and suggestions when appropriate. In the final week of formal training, participants staffed the reference desk on their own, with a librarian on call to assist as needed.

Lessons Learned
To enhance the classroom training session on online resources, we registered the students for Web-based training provided by the database vendors. Interestingly, we found that our technicians considered these demos difficult to follow and preferred database demonstrations provided in person by the librarians. We suspected this was due in part to the slower pace of the in-person sessions and our use of customized, practical sample

questions likely to be encountered at the library's reference desk.

Another challenge we faced was working with the students' differing levels of knowledge and experience with scientific research. We discovered that trainees were unfamiliar with citation terminology and its use by NIST researchers. For future training, we will add a vocabulary section to our wiki and provide an overview of how scientific researchers use literature in their work.

Notwithstanding these challenges, both the librarians and the technicians had a rewarding and positive experience with the program. The library technicians enjoyed and appreciated the opportunity to learn and assume a new role, and the librarians welcomed the opportunity to reach out to the technical services staff and demonstrate the basics of reference work. Technicians in particular found the program rewarding in that it enabled them to see the end result of the acquisitions, processing and cataloging work they perform

behind the scenes.

After seeing firsthand the variety and complexity of inquiries handled by the library, the technicians reported having a new appreciation for the skills of the professional library staff. They also found the structure of the program useful because of its dual emphasis on classroom and hands-on training. As one participant commented in a post on our wiki, "The training program is put together in a very logical format, with classroom training reinforced by hands-on experience, which has enabled me to quickly grasp the concepts of the program."

Of the five technicians who took part in the 2007 program, three continue to serve at our information desk while the other two have since been promoted to other positions within the library. Additional library technicians from our staff have expressed interest in the First Point of Contact Program, and we plan to conduct it again this year. **SLA**

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